



# NAMMC

Promoting Market Access for South African agriculture

# TRANSFORMATION REPORT ON TRUSTS AND LEVY EXPENDITURES

# 2023



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This report was compiled in collaboration with all the Trusts and levy administrators.



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## Acronyms

AAMP	Agriculture and Agro-processing Master Plan
AgriBEE	Agricultural Black Economic Empowerment
ARC	Agricultural Research Council
BBBEE	Broad-Based Black Economic Empowerment
BCI	Better Cotton Initiative
BEE	Black Economic Empowerment
CASP	Comprehensive Agricultural Support Programme
CFSA	Cape Flora South Africa
CGA	Citrus Growers Association
CGA-GDC	Citrus Growers Association Grower Development Company
Co-op	Co-operative
DAG	Directly Affected Groups
DFIDT	Deciduous Fruit Industry Development Trust
DALRRD	Department of Agriculture Land Reform and Rural Development
DIRCO	Department of International Relations and Cooperation
DRDAR	Department of Rural Development and Agrarian Reform
DTIC	Department of Trade Industry and Competition
EC	Eastern Cape
EIA	Environmental Impact Assessment
ETN	Ethical Trade Norway
FNB	First National Bank
GP	Gauteng
HACCP	Hazard Analysis and Critical Control Points
KZN	KwaZulu Natal
LDARD	Limpopo Department of Agriculture and Rural Development
M & E	Monitoring and Evaluation
MAP Act	Marketing of Agricultural Products Act
MIT	Meat Industry Trust
MP	Mpumalanga
MSc	Master of Science
NAMC	National Agricultural Marketing Council
NLT	National Lucerne Trust
NWGA	National Wool Growers Association
OAC	Oilseed Advisory Committee
OPDT	Oil and Protein Seeds Development Trust
PDI	Previously Disadvantaged Individuals
PGP	Phahama Grain Phakama
PhD	Doctor of Philosophy
PIDT	Potato Industry Development Trust
PLAS	Pro-Active Acquisition Strategy
POMASA	Pomegranate Association of South Africa
PSA	Potato South Africa
ROI	Return on Investment
RPO	Red Meat Producers' Organisation
SA	South Africa





SACTA	South African Cultivar Technology Association
SAGIS	South African Grain Information Services
SAGL	South African Grain Laboratories
SAMAC	Macadamias South Africa
SAPA	South African Poultry Association
SAPPA	South African Pecan Producers Association
SAPPO	South African Pork Producers' Organisation
SATI	South African Table Grapes Industry
SAWITU	South African Wine Industry Transformation Unit
SIZA	Sustainable Initiative of South Africa
TRC	Transformation Review Committee
VAT	Value-Added Tax
WC	Western Cape
WCDoA	Western Cape Department of Agriculture







## EXECUTIVE SUMMARY

Under Section 9 of the Marketing of Agricultural Products (MAP) Act (47) of 1996, the National Agricultural Marketing Council (NAMC) is responsible for investigating the applications of statutory measures, reporting to the Minister, and assessing and reviewing such measures at least every two years. Since 2001, the NAMC has conducted an annual review of all statutory measures implemented in terms of the MAP Act (the statutory measures implemented are levies, records and returns, and registration). This report focuses on the status of transformation interventions funded through statutory levy income and trust expenditure as part of the industry's commitment to inclusivity. The statutory levy income and trust funds are used to pay the following activities: administration (not more than 10%), consumer education, industry priorities in research and development, market access (both domestic and international), and transformation (at least 20%). It is important to note that the trusts use the same guidelines in funding transformation. Registration, records, and returns are measures used to collect and disseminate information in a particular industry. The assets (cash or real estate) that these industry trusts/bodies acquired from the control boards after deregulation are known as the trust funds. The statutory levies are industry commitments to ensure competitiveness, sustainability and viability. In accordance with the NAMC's transformation guidelines, agricultural trust funds and statutory levy funds are essential for financing transformation in South Africa's agricultural sector. Trusts and levy administrators spent a total of R266.4 million on transformation efforts in the 2022/23 financial year. Compared to the previous financial year, 2021/22, which had total expenditures of R235.1 million, this amounts to an increase of R31.3 million. Trusts contributed R82 million of the R266.4 million total, levy administrators contributed R184.4 million. The increase in spending could be a sign of a renewed commitment to transformation projects due to higher budget allocation.





## Introduction

This report provides an overview of transformation activities funded by statutory levies and Trust funds for 2022/23. The Marketing of Agricultural Products Act (Act no. 47 of 1996) enables industry financing through these levies and Trusts, which support various activities in the agricultural sector. Transformation is a crucial pillar funded through these instruments, aligned with NAMC guidelines. Initially, funding focussed on training, mentorship, social projects, and training material development. However, recent years have shifted towards enterprise development, skills development, and management control. This report highlights Trusts and industries' transformation-related activities, providing insight into efforts to increase sector inclusivity. It covers the NAMC's Transformation Review Committee (TRC), Trust and levy expenditure on transformation over the years, employment equity within the Trusts and industries, funded activities, beneficiaries, and impact.

## NAMC Transformation Guidelines

The Marketing of Agricultural Products Act, No. 47 of 1996 (MAP Act), outlines the process for introducing statutory measures, which industries have utilised to obtain approval and gazetting. The Minister of Agriculture, Land Reform and Rural Development approves statutory applications from commodity groups following the NAMC's investigations, coordination, and recommendations. One of the conditions of approval is that 20% of the levies collected should be used to fund transformation interventions in that sub-sector. To enhance effectiveness and efficiency, the NAMC developed transformation guidelines, including establishing the TRC, which oversees and evaluates the use of the 20% dedicated to transformation.

## Transformation Review Committee (TRC)

The TRC reviews transformation business plans, submitted with levy applications (in line with the NAMC's Transformation Guidelines presented in Table 1), and provides feedback. Industries approach transformation differently, but their activities and budget allocations must align with the guidelines. The TRC assesses transformation business plans when industries apply to establish or continue statutory levies. Levy administrators must also submit annual transformation plans outlining anticipated activities for the financial year. The TRC reviews, approves, and monitors these plans, evaluating previous transformation performances.








**Table 1:** NAMC's transformation guidelines

Pillar	Activities	Percentage
Enterprise development	<ul style="list-style-type: none"> <li>• Fund agribusinesses of black-owned farms by procuring production infrastructure, materials, and inputs.</li> <li>• The industry shall finance soil preparation services for field crops and horticultural products.</li> <li>• The livestock sector is responsible for purchasing vaccinations, dosage programmes, and veterinary services.</li> <li>• The industry shall fund the cost of accreditation and various legal and professional services (such as the Sustainable Initiative of South Africa (Siza) or the Hazard Analysis and Critical Control Points (HACCP)).</li> <li>• The industry shall assist farmers in accessing the market, including facilitating supply agreements or purchase contracts.</li> <li>• The industry shall fund business plan development.</li> <li>• The industry shall explore other funding options to increase the transformation budget (such as the Comprehensive Agricultural Support Programme (CASP), Jobs Fund, and others).</li> <li>• The industry shall ensure that appropriate agricultural infrastructure, machinery, and equipment are in good condition (e.g., electricity, water, and bio-security measures).</li> <li>• The industry shall procure materials, inputs, and services from black-owned enterprises and agribusinesses.</li> </ul>	60%
Skills development	<ul style="list-style-type: none"> <li>• Farmers and other stakeholders involved in the agricultural value chain, such as propagators, herders, processors, marketers, machine and equipment operators, mechanics, and supervisors, will receive training and mentorship to better manage their operations.</li> <li>• SETA-accredited skills developers shall provide training in terms of the AgriBEE Charter.</li> <li>• The industry shall grant bursaries to black people to ensure they develop the necessary capabilities to manage their farms and agribusinesses.</li> </ul>	18%
Management control	The industry shall fund the position of transformation manager. The appointment in this capacity shall only be funded for members of black-designated groups committed to equity.	17%
Ownership	The industry or alternative funding sources shall purchase equity in existing enterprises for black-designated groups.	5%
Socio-economic development	Industries are encouraged to perform activities that positively impact workers' quality of life and their communities.	

Reviewed industry transformation business plans





The NAMC transformation guidelines primarily focus on the 20% transformation expenditure of the total levy income, which supports black farmers and agripreneurs in industries that utilise statutory levies. Businesses applying for statutory levies are required to submit a business plan detailing their transformation activities and budgets. During the reporting period, the Transformation Review Committee (TRC) received and reviewed six (6) transformation proposals/plans, including those from the Deciduous Fruit Development Chamber (DFDC), Hortgro, Milk South Africa (Milk SA), South African Pecan Producers Association (SAPPA), South African Wine Industry (SA Wine), and Pome Fruit Producers Association (POMASA).

### **Monitoring and Evaluation (M&E) through site visits**

Section 4 of the NAMC transformation guidelines indicates that the NAMC TRC may conduct site visits at any given time to verify the progress of transformation projects as part of monitoring and evaluating transformation activities. In the 2022/23 financial year, the TRC conducted six (6) site visits to transformation projects implemented by levy administrators, as highlighted below.

#### **Milk South Africa**

From 05 to 08 December 2023, the NAMC Transformation Review Committee (TRC), comprising representatives from the National Agricultural Marketing Council (NAMC) and the Department of Agriculture, Land Reform and Rural Development (DALRRD), visited eight black-owned dairy farms in the Free State Province. The purpose of the visit was to monitor transformation activities funded through the 20% levy income. The visit revealed a collaborative approach that combined government support and industry initiatives. The government's commitment to supporting black farmers is evident in providing essential infrastructure, including milking parlours, storage facilities, fencing, and necessary inputs. A notable achievement of this collaboration is the electrification of farms, which was made possible by the dairy industry's 20% transformation levy. While progress is evident, challenges persist in the daily operations of these dairy farms. Stock theft remains a significant threat to farmers' livelihoods of the farmers, and farm attacks have been reported,

highlighting the need for increased security measures and community engagement. Additionally, the issue of water rights poses a challenge for these farmers, as it is essential for sustaining the agricultural landscape.

#### **Macadamias South Africa (SAMAC)**

From 23 to 26 April 2023, the NAMC Transformation Review Committee (TRC) and Macadamias South Africa (SAMAC) visited macadamia farmers in Mpumalanga province. SAMAC, the commodity organisation overseeing South Africa's macadamia industry, provided farmers with technical support, inputs, equipment, and infrastructure. This assistance included trees, chemicals, fertilisers, tractors, mowers, irrigation systems, pack houses, chemical storage, de-husking facilities, and aid in obtaining Global GAP accreditation. SAMAC uses a 70/30 match funding model when procuring equipment, ensuring farmers are invested and accountable for the resources acquired on their behalf.

#### **Raisins SA**

On 6 - 7 June 2023, the NAMC Transformation Review Committee visited transformation projects implemented by Raisins SA in the Northern Cape Province using transformation funds. The Department of Agriculture, Land Reform and Rural Development (DALRRD), PepsiCo, Food InBev, and Kgodiso Development Fund were invited. The committee visited four projects under Raisins SA's Enterprise Development programme, which received additional support from DALRRD and PepsiCo through the Kgodiso Development Fund, with potential for commercialisation. Raisins SA aims to promote the inclusivity of black role-players in the raisin industry and create sustainable enterprises. The invitees also attended the official opening of Vine Academy.

#### **Hortgro**

From 9 to 12 August 2023, the NAMC's Transformation Review Committee (TRC) visited transformation projects implemented by Hortgro and Hortfin in the Western Cape Province using transformation funds. The TRC was joined by the National Department of Agriculture, Land Reform and Rural Development (DALRRD) and NARYSEC. The visit provided an opportunity for the NAMC's TRC to assess the impact







of Hortgro's and Hortfin's support on emerging black farmers in the deciduous fruit industry. Six projects were visited, each with varying levels of development and offering tailored support services based on individual needs. Hortfin, overseen by the deciduous fruit industry, receives support from the Jobs Fund, commercial financial institutions, government, DFIs, and industry organisations.

### **Potato Industry Development Trust (PIDT)**

From 3 to 5 October 2023, the National Agricultural Marketing Council's (NAMC) Transformation Review Committee (TRC) was invited by the Potato Industry Development Trust (PIDT) to evaluate transformation projects in the Limpopo Province, implemented with transformation funds. The invitation was extended to PIDT trustees and the National and Provincial Departments of Agriculture. The visit provided an opportunity for the NAMC's TRC to assess the impact of PIDT support on emerging black potato farmers. Eight projects were visited in various stages of development under the PIDT, namely Enterprise Development and Small-Growers Programme. These projects also receive support from the provincial Department of Agriculture, and some benefit from the AgriBEE fund. This government collaboration has enabled the industry to make a significant impact.

### **Cape Flora South Africa**

From 7 to 9 November 2023, the National Agricultural Marketing Council's (NAMC) Transformation Review Committee (TRC) visited transformation projects that Cape Flora South Africa, implemented in the Western Cape Province. The visit provided an opportunity for the NAMC's TRC to assess the impact of Cape Flora SA's support on emerging black farmers and agripreneurs. The TRC and Cape Flora SA visited five projects, including two black-owned initiatives. The remaining three projects showcased commercial operations and the industry's aspirations for increased black participation in the Cape flora sector.

### **Challenges identified by the TRC**

Several challenges have been identified that hinder the commercial viability of these projects, as per industry standards. The industry cannot address these challenges alone and requires coordinated support. The challenges are:

- Access to funding from commercial banks
- Access to sufficient land for expansion
- Lack of water rights for irrigation
- Inability to use farms as collateral for bank financing
- Load-shedding affecting daily farm operations

### **Industry Transformation Committee Meetings**

NAMC TRC members participated in various industry transformation committees to strengthen relationships and guide transformation activities. During the period under review, the TRC attended the following transformation committees:

- Potato South Africa (PSA) Transformation Committee meeting
- Raisins South Africa Transformation Committee meeting
- South African Poultry Association (SAPA) Transformation Committee meeting
- Mohair Empowerment Trust
- Wool Empowerment Trust (establishment)
- South African Pork Producers Organisation (SAPPO) Business Development meeting



## EMPLOYMENT EQUITY AND JOB CREATION BY AGRICULTURAL TRUSTS AND COMMODITY INDUSTRIES DURING THE 2022/23 PERIOD

DALRRD strongly encourages its stakeholders to comply with the Employment Equity Amendment Act, No. 47 of 2013, which promotes equal opportunities and fair treatment in employment. It also ensures equal representation at all levels throughout the organisation. Moreover, agricultural Trusts and commodity organisations have started hiring individuals from historically disadvantaged groups. **Table 2** shows the breakdown of employment by racial groupings in various Trusts and industries. In total, there were 93 (53%) White, 25 (14%) Coloured, 1 (1%) Indian and 55 (32%) African workers in 2023. These figures represent the labour makeup within Trusts and levy-collecting industries. Despite progress in employing individuals from previously disadvantaged groups, disparities persist, as the workforce composition data shows.

**Table 2:** Staff composition of statutory measures and Trust administrators

Industry/Trust name	African	Coloured	Indian	White	Total
Cotton SA	5	1	-	7	13
Pecan SA	1	-	-	6	7
SACTA	1	-	-	1	2
Milk SA	4	2	-	3	9
SAPPO	9				9
SAMAC	1		1	8	10
Table eggs	2	-	-	4	6
Cape flora	-	-	-	-	0
Mohair South Africa	5	-		6	11
Deciduous Fruit Industry Trust	-	1	-	1	2
Meat Industry Trust	-	2	-	3	5
National Lucerne Trust	-	-	-	1	1
CGA-GDC	9	-	-	-	9
Raisins SA	-	3	-	4	7
SA Wine	3	9	-	15	27
SATI	1	4	-	7	12
POMASA	-	-	-	1	1
Oil and Protein Seeds Development Trust (OPDT)	-	-	-	2	2
SA Olives	2		-		2
Wool Trust	-	2	-	2	4
Potatoes South Africa	12	1	-	20	33
<b>Total</b>	<b>55</b>	<b>25</b>	<b>1</b>	<b>93</b>	<b>174</b>

Source: Industry information, 2024



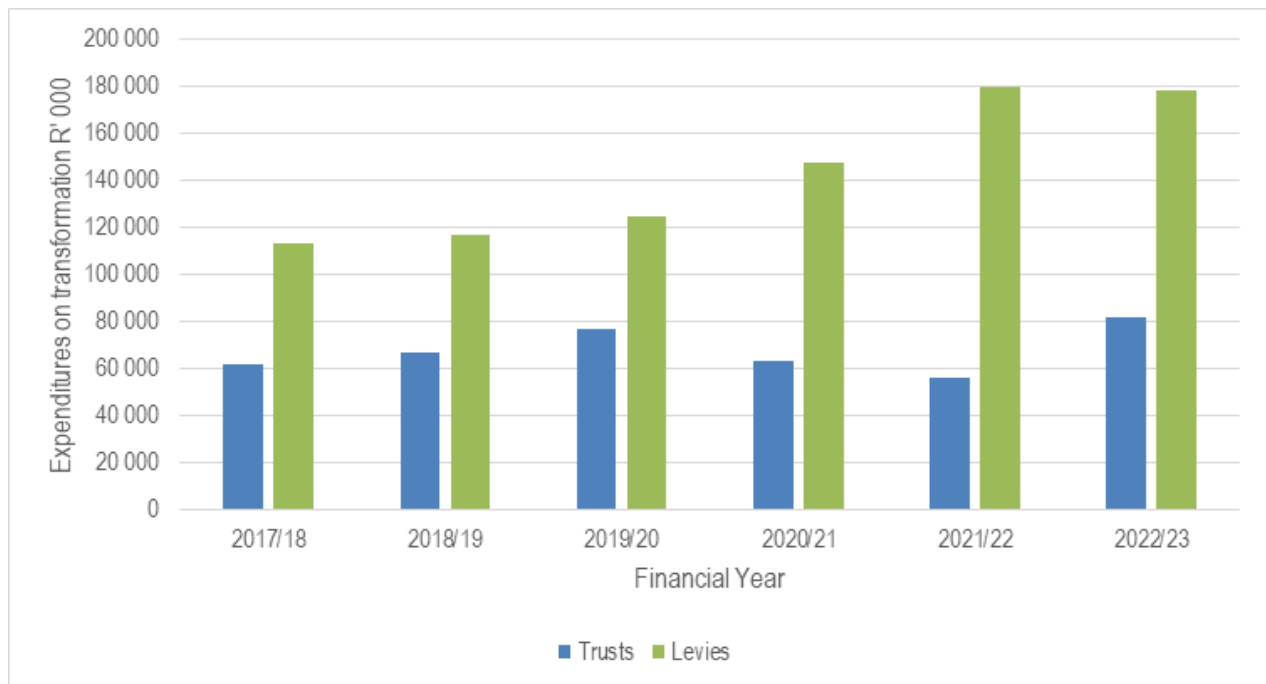


## AGRICULTURAL TRUST AND LEVY INCOME/EXPENDITURE ON TRANSFORMATION OVER THE YEARS (2017/18 TO 2022/23)

Trusts and levy income are essential for funding agricultural transformation. The proceeds from Trusts fund transformation, whereas levies are subject to a 20% transformation condition. The NAMC’s transformation guidelines have proven effective in transforming the funding sector. Figure 1 shows expenditures on transformation initiatives by Trusts and levy administrators from the 2017/18 financial year to the 2022/23 financial year. In the 2022/23 financial year, Trusts and levy administrators spent R260.3 million on transformation initiatives, a R25 million increase from the previous year’s total of R235.2 million. Trusts contributed R82 million, while levy administrators provided R178.3 million. Increased spending may indicate a renewed focus on transformation initiatives driven by increased funding allocation.

The transformation expenditure by Agricultural Trusts and Levy Administrators in South Africa over the past decade has focussed on addressing the challenges and opportunities within the agricultural sector. Efforts have been made to promote innovation, productivity, and sustainability in agriculture, particularly through initiatives to empower historically disadvantaged groups. Transformation expenditure has also been directed towards balancing efficiency and equity in the agricultural sector, considering factors such as infrastructure, market access, and the need to support small-scale farmers. Overall, the expenditure has aimed to drive agricultural transformation by increasing productivity and fostering economic growth while addressing historical inequalities and promoting inclusivity.

**Figure 1:** Agricultural Trust and levy expenditures on transformation over the years (2017/18 to 2022/23)



Source: NAMC’s calculations, 2024

## TRANSFORMATION INITIATIVES

### Field Crops

#### Cotton South Africa

Cotton South Africa provides training, mentorship, implementation, and transformation monitoring for black smallholder farmers in South Africa. The industry is directly involved in five projects and indirectly in ten others based in the Mpumalanga province. Cotton SA spent R1 300 000 on transformation, with R118 000 allocated to enterprise development, focussing on co-operative governance, and R1 100 000 on skills development for training (see **Table 3**). Additionally, R8 500 was spent on management control, focussing on project management, R14 200 was allocated to the ownership component as part of establishing a new gin, and R110 602 was spent on socio-economic development initiatives.

**Table 3:** Cotton SA's transformation expenditure for 2022/23

Pillar	Specific Activities Funded	Amount Spent (Rands)
Enterprise development	Co-operative Governance	118 000
Skills development	Training	1 100 000
Management control	Project Management	8 500
Ownership	New Gin	14 200
Socio-economic development	BCI	110 602
<b>Total</b>		<b>1 351 302</b>

Source: Cotton SA, 2024

Commercialisation and sustainability: Despite inadequate funding in 2022, smallholder farmers made progress in 2023 but continue to struggle with commercialisation.

■ **Participation of black farmers in cotton production:** The involvement of black farmers in the cotton value chain is vital for transformation and inclusivity in South Africa's agricultural sector. There are approximately 2 106 cotton producers in South Africa, of which 2 062 are smallholder farmers (predominantly black), and 44 are commercial farmers (predominantly white). Currently, white commercial farmers control 91-92% of the cotton market, while black smallholder farmers control only 8-9%. To bridge this gap, Cotton SA has developed a national strategy with seven cotton gins in South Africa, aiming to produce at least 20% of the national crop by black farmers by 2030.

#### The South African Cultivar Technology Agency (SACTA)

The South African Cultivar and Technology Agency (SACTA) was established to administer breeding levies for self-pollinated grain and oilseed crops, including wheat, barley, oats, soybeans, and lupines. In the 2022/23 financial year, SACTA invested R44.5 million in transformation initiatives.

**Table 4:** SACTA's expenditures on transformation, 2022/23

Pillar	Activities funded	Amount spent (Rands)
Enterprise development	Input Finance & Mechanisation	39 575 410
Skills development	Bursaries and Internships	2 870 414
Management control	Staff	1 706 398
Socio-economic development	Funding for rural schools	366 526
<b>Total</b>		<b>44 518 748</b>

Source: SACTA, 2024







**Table 4** outlines SACTA’s transformation expenditure and activities for the 2022/23 financial year, categorised into four pillars. A total of R44.5 million was spent on transformation. SACTA’s investment of R39.6 million in input finance and mechanisation for Enterprise Development is notable, providing essential resources to farmers nationwide. SACTA provides interest-free loans for three years for production inputs and five years for farm equipment. Projects are implemented through reputable service providers with good credit facilities and technical teams on the ground. Current service providers for Enterprise Development include FarmSol, Phahama Grain Phakama NPC, AgriCredit Solutions (SENWES), Agriqua (TWK), and For Farmers East.

Additionally, SACTA allocated R2.8 million for skills development, supporting bursaries and internships to enhance agricultural education and expertise. Funds are earmarked for postgraduate studies and internship programmes on breeding and technology. In 2023, SACTA funded six Honours, 12 MSc, and three PhD students. A further R1.7 million was allocated for management control.

Furthermore, SACTA invested R366 526 in socio-economic development initiatives, including establishing, improving, and maintaining water infrastructure for rural schools, demonstrating its commitment to uplifting communities nationwide. The Socio-Economic pillar of SACTA’s transformation initiatives focuses on enhancing socio-economic conditions in targeted regions through establishment and improvement activities, which include improving and maintaining water source infrastructure to support small-scale production and rural schools.

### The Maize Trust

The Maize Trust funds industry bodies to implement research, market information, and transformation activities in the maize industry. Although it does not manage statutory levies, its transformation programme follows the NAMC’s guidelines. In the 2022/23 financial year, R27 million was allocated for transformation initiatives channelled into programmes supporting new black commercial maize farmers. Annual funding goes to Farmsol, Grain SA, and Phahama Grain Phakama NPC (PGP) for training, technology transfer, and farmer skills development. The Trust also administers an annual bursary scheme targeting MSc and PhD students to stimulate studies in maize-related fields and create skilled capacity within South African agriculture. Additionally, the Trust funds several interns and supports a national school programme to inform learners from previously disadvantaged communities about agricultural careers and the value of agricultural pursuits.

**Table 5:** The Maize Trust’s expenditure on transformation, 2022/23

Activity	Amount Spent (Rands)
Bursaries	1 318 250
Potential Commercial Farmers & Mentorship	18 317 895
Training, study groups, offices, etc	7 529 736
<b>Total</b>	<b>27 165 881</b>

Source: The Maize Trust, 2024

### The Sorghum Trust Funding

The Trust provides funding for several complementary programmes to create new black commercial sorghum farmers through various transformation functions. The NAMC’s transformation guidelines inform the Trust’s programme, although it does not manage statutory levies. The Trust annually funds Grain SA for training, technology transfer, and farmer skills development. Additionally, it offers an annual scholarship for MSc or PhD students to stimulate studies in sorghum-related fields and create skilled capacity within South African agriculture. As per the Trust’s policy, most bursaries go to previously disadvantaged students from all South African universities.





**Table 6** presents a summary of the Sorghum Trust’s spending allocations. In the 2022/23 financial year, the Trust approved R1.16 million in funding, with R273 785 allocated for transformation initiatives. New role players approached the Sorghum Trust for funding to implement transformation initiatives; however, the Trust encountered difficulties obtaining sufficient information from these new entities, resulting in no funds being spent on transformation during the period under review.

**Table 6:** The Sorghum Trust’s allocation for transformation for 2022/23

Activities	Amount (Rands)
Research	354 552.30
Market information	535 250.76
Transformation	273 785.56
<b>Total</b>	<b>1 163 588.62</b>

Source: The Sorghum Trust, 2024

### Oil and Protein Seeds Development Trust

The Trust primarily focuses on research and development initiatives benefiting oilseed producers (developing and commercial) in South Africa and other value chain stakeholders. The focus is on sunflower, soybean, canola, and groundnut. Additionally, the Trust manages a transformation programme encompassing training, mentoring, information provision, enterprise development, community upliftment, input financing, insurance and technology transfer. This programme is managed based on project funding within the Trust Deed and NAMC’s Transformation Guidelines, which require investing at least 20% of the raised funds in transformation. In the 2022/23 financial year, the Trust spent R24 million on transformation initiatives. Furthermore, the Trust awards 10 MSc and PhD bursaries annually to deserving students enrolled in South African universities, complementing its direct assistance to farmers.

**Table 7:** Summary of OPDT expenditure on transformation for 2021/22

Activities	Amount (Rands)
Farmer Development (training, Pula/ Imvula, trials and mentoring, advanced farmer input support)	R5 261 308
Creating job opportunities in soy planting and micro and macro soy agro-processing businesses	R7 538 945
OPDT/ OAC Transformation initiatives	R11 000 000
Bursary scheme	R700 000
Community upliftment	R197 027
<b>Total</b>	<b>R24 697 208</b>

Source: OPDT, 2024

### National Lucerne Trust (NLT)

The Trust’s goal is to help aspiring farmers and agribusiness owners advance from subsistence to commercial farming systems. **Table 8** provides a summary of the transformation projects supported by the National Lucerne Trust (NLT). In the 2022/23 financial year, the NLT spent R504 522 on transformation initiatives. Specifically, the NLT provided R255 000 to the Smallholder and Agripreneur Development Project during the period under review, while R67 000 was allocated to the UFS Student Bursary and the Lucerne Hay Grading Course. Lastly, the NLT allocated R1 750 to socio-economic development initiatives.







**Table 8:** Transformation projects supported by National Lucerne Trust for 2022/23

Pillar	Activities Funded	Amount spent (Rands)
Enterprise development	Smallholder Farmer and Agripreneur Development Project	255 858.85
Training and Skills development	Lucerne Hay Grading Course and UFS student Bursary	67 720.20
Socio-economic development	Sustainable Rural Education and Development Project	1 750
Management control	Personnel costs	179 192.95
<b>Total</b>		<b>504 522</b>

Source: NLT, 2024

## Livestock

### Milk South Africa (Milk SA)

Transformation in the dairy industry is about competitiveness and increasing the market share of black dairy entrepreneurs. The industry has established criteria for selecting beneficiaries and has partnered with milk buyers to promote meaningful participation in the dairy market. They have appointed an independent, experienced livestock broker to secure pregnant heifers and a dairy consultant who consults with local and international commercial farmers to conduct workshops for project beneficiaries and workers, developing dairy enterprise technology and business skills.

**Enterprise development:** Milk South Africa invested R8.6 million in Enterprise Development, delivering 67 pregnant heifers to five beneficiaries and two bulls to one beneficiary on a 25%:75% cost-sharing basis and 235 tonnes of lucerne to eight out of 21 beneficiaries.

**Commercialisation and sustainability:** The dairy industry aims to enhance black producers' competitiveness and market share by promoting the sustainability and commercialisation of their dairy enterprises. Milk SA supports 21 dairy enterprises, producing approximately 2 393 984 kilogrammes of milk from 760 cows. These enterprises are located across four provinces: Free State (13 farmers), KwaZulu-Natal (3), Eastern Cape (2), and Gauteng (2). Over the past decade, Milk SA has successfully contributed to the sustainable commercialisation of 20 smallholder dairy enterprises, and over 125 jobs were created.

**Black farmers' participation in milk production:** According to Milk SA, there are 891 milk producers in South Africa. In 2023, 21 BEE projects produced 2 393 984 kilogrammes of milk. Milk SA projects contributed a mere 0.09% to the total milk production of 3 349 861 004 kilogrammes in 2022. Notably, the information provided by Milk SA pertains to the sustainable commercialisation of smallholder dairy enterprises supported by the organisation.

### South African Pork Producers' Organisation (SAPPO)

SAPPO is committed to promoting sustainable growth in the pig industry. It currently supports 78 farms through mentorship and veterinary services and five farms through accounting services. In the Enterprise Development area, SAPPO has assisted farmers with financial planning for piggery expansion, carcass quality evaluation, sourcing financial assistance for smallholder farmers, and combating the spread of African swine fever. During the period under review, SAPPO invested R9.7 million in transformation initiatives. Enterprise development: Of the total transformation expenditure, R4.8 million was allocated to enterprise development, benefiting 120 individuals. Skills development: A significant portion of R2.6 million was allocated for skills development. SAPPO's goal is to equip farmers with comprehensive knowledge of piggery production, including essential technical skills. During





the review period, practical pig production training was completed, covering training materials and travel expenses. Additionally, SAPPO awarded bursaries totalling R147 671 to nine staff members to enhance their knowledge.

**Management and administration costs:** R2.2 million was spent on facilitating transformation support for farmers.

**Commercialisation and sustainability:** In the reporting period, SAPPO successfully supported one project in achieving commercial viability through improved housing infrastructure. Although twelve projects were discontinued, 67 others remained viable and sustainable thanks to SAPPO's assistance.

**Black farmers' participation in pig production:** SAPPO aims to promote inclusive growth by increasing black pork producers' participation and market share. The pork industry comprises approximately 343 producers, including 319 smallholder farmers (mainly black) and 115 commercial farmers (mainly white). Currently, smallholder farmers hold 30% of the market, while commercial farmers hold 70%. To boost market share, SAPPO intends to improve production efficiencies and biosecurity through mentorship and veterinary services.

#### **Table eggs industry**

SAPA recognises transformation as a top priority due to the industry's dualistic nature and the broader agricultural sector. The industry believes that collaborative efforts between industry and government are crucial for achieving tangible results. The table egg industry invested R826 919.10 in transformation initiatives. Enterprise development expenditures totalled R246 335, covering business plan development and environmental impact assessments (EIA) for farmers seeking expansion funding. Additionally, R580 584.51 was spent on skills development through farmer audits and nationwide training workshops. **Commercialisation and sustainability:** In terms of commercialisation and sustainability, the table egg industry supports over 70 producers annually. The sector has also assisted 19 DALRRD leased farms with environmental impact assessments and business plans. In the future, the industry will offer interest-free loans for enterprise development to support producers.

#### **Mohair Trust**

The Mohair Trust implements transformation through the Mohair Empowerment Trust, a separate entity established in 2010 to promote black economic empowerment in the mohair industry. The Empowerment Trust focuses on developing sustainable, large-scale black mohair producers who can contribute to the sector through interest-free loans, training, and support. In 2022, the Trust invested R2.7 million in transformation initiatives through the Mohair Empowerment Trust, with R1.5 million allocated to purchasing Angora goats and R1.2 million to training emerging farmers. Notably, the Mohair Empowerment Trust has successfully commercialised several black emerging farmers as part of its five-year programme and aims to empower more farmers in the future. Through the Empowerment Trust, the Mohair Trust has formed partnerships with various entities, including AGRISETA, Grootfontein Agricultural College, NAMC, DRDAR, and ECDC.

#### **Wool Trust (Cape Wools)**

The wool industry's transformation approach focuses on enhancing the livelihoods of over 40 000 black small-scale and emerging wool sheep producers in South Africa through targeted development interventions. The objective is to improve wool quality and quantity, enhance market readiness and access, increase household income, and support producers in transitioning to commercial wool production.

The industry's strategy is built around several key pillars: It aims to organise small-scale producers into wool growers' associations, enabling collective management of wool harvesting, classification, packaging, and preparation for formal market access. The strategy involves training and mentoring farmers in various aspects of wool sheep production, including sheep shearing, wool classing, nutrition, health, breeding, pasture and predation management, basic financial management, and shearing shed operations. The strategy prioritises developing shearing infrastructure, genetically improving communal flocks, and facilitating market access through suitable wool broker companies. **Table 9** outlines the Wool Trust's transformation expenditures.





**Table 9:** Transformation projects funded by the Wool Trust, 2022/23

Pillar	Activities Funded	Amount Spent (Rands)
Enterprise development		
Skills development	Shearer and Farm Worker Training	4 793 073
Socio-Economic development	NWGA T&D - Training and mentorship	5 026 334
<b>Total</b>		<b>9 819 407</b>

Source: Wool Trust, 2024

**Black farmers’ participation in wool production:** The wool industry comprises approximately 13 064 producers, including 231 smallholder farmers, predominantly black, and 7 549 commercial farmers, mainly white (excluding sheds and other entities). Smallholder farmers hold a 13% market share, indicating their industry participation, while commercial farmers dominate with an 87% market share, highlighting existing disparities.

**Infrastructure development:** Infrastructure is crucial for wool production and shearing. The Wool Trust aims to provide communal farmers with essential infrastructure to enhance their wool’s local and global competitiveness. With funding from Sibanye Stillwater Mines, three strategically located shearing sheds were built in Region 20 - Mbobeleni (Libode), Bantu Bonke (Buntingvale), and Zakhele (Qunu). These sheds feature essential facilities like yard fences, sheep dipping tanks, and gender-segregated toilets. Despite the presence of poor-quality, cross-bred sheep in these areas, plans for further training are underway. In Region 24, the Eastern Cape Department of Rural Development and Agrarian Reform (DRDAR) constructed two multi-purpose sheds in Mbizana Local Municipality, serving Ndakeni and Nyaka, and an additional shed at Mangquzu WGA (Flagstaff). Furthermore, uMzimvubu Local Municipality provided 28 wool presses for uMzimvubu ward associations.

### Meat Industry Trust

The Meat Industry Trust (MIT) prioritises funding bursaries that advance education in fields relevant to South Africa’s red meat industry. In 2023, the Trust allocated R624 000 towards bursaries, awarded based on study fields that enhance the industry. The primary goal is to promote livestock welfare and improve the industry overall. Additionally, MIT has set aside R2 million for transformation initiatives, supporting programmes that empower historically disadvantaged individuals or communities within the industry. MIT has partnered with the Buhle Academy to verify and evaluate the top 10 nominated farmers.

### Horticulture

#### Cape Flora South Africa (CFSA)

Cape Flora SA (CFSA) lacks a Transformation Manager due to financial constraints but shares resources with industry associations like Hortgro through a secondment agreement. Despite limited funds, transformation remains a key focus, with CFSA adopting a partnership-based approach to support black producers’ developmental needs. With a modest transformation budget, CFSA aims to leverage its industry expertise to create opportunities for black producers, including wild harvesters. CFSA spent R241 476 on transformation during the reporting period, supporting 31 beneficiaries.

**Enterprise development:** Of the total transformation expenditure, R155 382 was invested in enterprise development, benefiting 120 individuals. CFSA supported five projects in acquiring inputs and receiving technical advice. Notably, one beneficiary supplies both local and export markets. In the Skills development pillar, Cape Flora SA allocated R86 094 to conduct a basic production course and provide mentorship.







Commercialisation and sustainability: CFSA supported four projects under its transformation initiatives. Approximately eight different entities have been supported in the past five years at varying stages/levels of development, remaining part of ongoing support.

Black farmers’ participation in Cape Flora production: According to Cape Flora South Africa, there are 101 Cape Flora producers in the country. Five smallholder farmers, mostly black, with two BEE projects, and 94 commercial farmers, mostly white, are the country’s producers.

**Citrus Growers Association – Grower Development Company (CGA-GDC)**

The Growers Development Company adopts a holistic approach to transformation, considering both internal and external factors. Externally, they engage with suppliers and prioritise diversifying the supply chain by supporting small businesses and black-owned farms. As shown in Table 10, CGA-GDC invested R31 million in transformation initiatives.

**Table 10:** CGA-GDC’s transformation expenditure for 2022/23

Pillar	Activities funded	Amount spent (Rands)
Enterprise development	Supporting emerging growers with integrated pest management (IPM), electricity, diesel, packing material, compliance, and trees.	31 000 000
<b>Total</b>		<b>31 000 000</b>

Source: CGA-GDC, 2024

Enterprise development: CGA-GDC allocated R31 million to support black-owned citrus enterprises. The citrus industry has set aside resources to address some of the challenges in the form of the Enterprise Development funding. This allocation covered various needs such as production support, integrated pest management (IPM), electricity, diesel, packing materials, compliance, and trees. The main objective of the fund is to create an enabling environment for majority black-owned enterprises to improve their productivity and competitiveness. The major challenges faced by these enterprises include financial uncertainty arising from high input costs, price fluctuations, and stringent market requirements.

Commercialisation: The CGA-GDC was in its third year of implementing the Economic Transformation of Black Citrus Growers programme, which ended its final year of implementation with approved projects valued at R273 million. Stakeholders involved include CGA, DALRRD, AgriSETA, and Jobs Fund. The programme has reached the end of the disbursement phase and will focus on reporting of KPIs until 31 March 2025. Total funds have been allocated to 14 projects implemented by 11 entities across South Africa. Job creation has been steadily increasing, with 122 new seasonal jobs reported and 6 new permanent jobs reported for the quarter, bringing the total job numbers for seasonal and permanent jobs to 1 035 and 96, respectively.

**Macadamia**

Macadamia South Africa (SAMAC) takes a farmer-centric approach to transformation, striving to create a macadamia nut industry that reflects South Africa’s diversity, promotes economic empowerment, and achieves sustainable development. SAMAC forms strategic partnerships across sectors and institutions to enhance the industry’s value. The organisation develops comprehensive solutions to support small-scale farmers throughout the value chain, enabling their progression towards commercialisation. Through targeted initiatives, continuous improvement, and





collaborations, SAMAC aims to create a future where South Africa’s macadamia nut industry serves as a model of transformation and success. As shown in Table 11, SAMAC allocated funds towards various transformation initiatives in the 2022/23 financial year, categorised into four pillars: Enterprise development, skills development, management control, and socio-economic development.

**Table 11:** SAMAC expenditures on transformation, 2022/23

Pillar	Specific activities funded	Amount spent (Rands)
Enterprise development	Capital investments in trees, land preparation, irrigation, and water infrastructure.	3 624 095
Skills development	Training for emerging farmers, covering macadamia phenology, Global GAP, audits in partnership with TFSA, and learnerships.	1 988 013
Management control	Management and oversight expenses related to the transformation process.	646 182
Socio-economic development	Construction of a school kitchen to prepare meals using food sponsored by the community and building bathroom facilities and sports fields for school children.	334 444
<b>Total</b>		<b>6 592 736</b>

Source: SAMAC, 2024

- **ENTERPRISE DEVELOPMENT:** SAMAC invested R3.6 million in capital expenditure projects to enhance the macadamia industry’s infrastructure and operational capacity. The funds were used to acquire vehicles and machinery, establish processing facilities, and prepare land. These investments were made across multiple provinces, including KwaZulu-Natal, Limpopo, and Mpumalanga, focussing on boosting production efficiency and supporting macadamia farmers.
- **SKILLS DEVELOPMENT:** SAMAC prioritised skills development, investing R2 million in programmes empowering emerging farmers and agricultural students. This investment included training in macadamia phenology, theoretical and practical learnerships, and Global GAP certification. Implemented across Limpopo, Mpumalanga, and KwaZulu-Natal, these initiatives aimed to enhance the knowledge and skills of those involved in macadamia farming.
- **MANAGEMENT CONTROL:** SAMAC allocated R646 182 to manage and oversee transformation, demonstrating its commitment to effective governance and strategic oversight. This investment ensures the success and sustainability of transformation initiatives across regions.





#### ■ **SOCIO-ECONOMIC DEVELOPMENT: SAMAC**

dedicated R334 444 to community development projects, enhancing local communities' socio-economic well-being. The initiatives included the construction of school kitchen facilities, bathroom facilities, and sports fields for children. Implemented in provinces like KwaZulu-Natal and Limpopo, these projects uplifted communities and improved residents' quality of life.

#### **The participation of black farmers in the macadamia industry:**

Black farmers' participation in the macadamia industry is crucial for its transformation. Among 1 371 producers, 415 are smallholder farmers (predominantly black), while 956 are commercial farmers (predominantly white). However, smallholder farmers' market share is low at 4%, compared with commercial farmers' significantly larger share of 96%. Efforts are underway to address this gap by securing match funding from government and private partners. These initiatives aim to provide smallholder farmers with the necessary resources and support to increase their market share, promoting inclusivity, economic empowerment, and equity in the macadamia industry.

#### **Raisins South Africa**

Raisins South Africa aims to empower growers to achieve sustainability and success through its transformation mandate. The industry supports black businesses in becoming sustainable commercial operations via enterprise development. It supports eight projects and funds capacity building for externally funded projects. As part of skills development, the industry provides farmers with training and offers bursaries to previously disadvantaged groups. Socio-economic development initiatives offer financial assistance to farming communities. Raisins SA adheres to NAMC Transformation guidelines when implementing transformation initiatives. During the review period, Raisins SA invested R7.2 million in transformation efforts.

**Enterprise development:** Raisins SA spent R2 683 712 of its transformation budget on enterprise development initiatives to enhance market access and provide financial support to at least 50 producers. Through strategic partnerships, Raisins SA provided interest-free loans totalling over R3.21 million to

eight emerging producers, facilitated through a collaboration with PepsiCo. Additionally, Raisins SA offered farm development assistance, including soil preparation, planting materials, fertilisers, poles, wires, and drainage, to seven producers. Notably, three farmers received R200 000 each from Agri-Enterprise, and a three-year contract was signed with Carpe Diem for women's initiatives. Moreover, Raisins SA successfully implemented and monitored two projects worth R20 million through the Kgodiso Development Fund, promoting sustainable vineyard development and farmer ownership.

■ **Skills development:** During the review period, Raisins SA invested R2 379 191 in skills development initiatives, enhancing technical expertise and capacity within the industry. The investment included a Guidance Officer Programme to develop best practices and transfer technical skills to Department of Agriculture extension officers. Raisins SA also conducted structured training sessions, including a 6-month programme for 236 farm workers and a SATI Short course attended by 30 farmers. Additionally, Raisins SA facilitated the placement of 76 graduates, with five securing permanent positions, contributing to industry growth and sustainability.

■ **Socio-economic development:** During the review period, Raisins SA invested R241 628 in socio-economic development initiatives, including the Mandela Day project. This project saw the Raisins SA team engaging with the community and contributing to social upliftment efforts.

■ **Black farmers' participation in raisin production:** The raisin industry comprises approximately 700 producers, including 140 smallholder farmers, predominantly black, and 560 commercial farmers, predominantly white. Smallholder farmers account for 20% of the market share, highlighting their importance in the industry. In contrast, commercial farmers hold the majority of the market share, accounting for 80% of production.

#### **South Africa Wine (SA Wine)**

SA Wine has adopted a comprehensive transformation approach to promote the growth and empowerment







of black wine and brandy stakeholders, aiming to create a more inclusive industry. The organisation supports the development, growth and empowerment of profitable and sustainable black wine and brandy stakeholders through infrastructure development, technical assistance, business expertise and management support. Additionally, it facilitates businesses' access to funding, markets, and corporate governance training. The organisation also promotes fair and ethical working and living conditions for farmworkers. During the review period, SA Wine invested R24.1 million in transformation initiatives (see **Table 12**).

**Table 12:** SA Wine's expenditure on transformation for 2022/23

Pillar	Activities	Amount spent (Rands)
Enterprise development	Grant Funding, Market Access, Mentorship, Communication Platform, Technical Support, Conference Support, Information Day, WOSA Membership, Brand Home Initiative, WIETA Contribution	21 991 530
Skills development	Pinotage Youth Development Academy, Wine Online Training, Business School Masterclass, Graduate Business School, Production Leadership Course, Wine Training, Cape Winemakers Guild, Labour Union Training	2 121 500
Management control		-
Socio-economic development		-
<b>Total</b>		<b>24 113 030</b>

Source: SA Wine, 2024

**Enterprise development:** For the 2022/23 financial year, SA Wine invested R22 million in enterprise development. Twenty-five Black Owned Brands enterprises received grant funding for marketing, packaging, promotional, accounting services, and travel costs. Additionally, funds supported infrastructure development and the acquisition of manufacturing assets and equipment for Black-owned farms, with a portion allocated to three entities to address flood damage. Furthermore, 21 enterprises received market access support for local and international trade shows and exhibitions, enabling Black Owned Brands to showcase their products and connect with international importers, retailers, buyers, media, and customers. Four entities also received support with liquor licence applications.

**Skills development:** A total of R1.1 million was invested in skills development. The PYDA-funded programme offers youth and PDI learners training opportunities to develop skills for meaningful employment in wine tourism, with a 95% employment success rate. Additionally, labour union programmes received support.

**Partnerships:** SAWITU aims to establish partnerships and collaborations with various stakeholders to fulfil its mandate. As industry influencers, they shape policy and drive transformation. Key partners include the WCDoA, DALRRD, DTIC, DIRCO, and the NAMC, enabling SAWITU to access funding, support, and resources. This support encompasses funding, market access, mentorship, technical services, and advocacy. The WCDoA co-sponsors The Wine Arc initiative in Stellenbosch, while TWA supports e-commerce development, maintenance, market access, and mentorship.



### South African Table Grape Industry (SATI)

The South African Table Grape Industry (SATI) is dedicated to promoting equal opportunities and support for black farmers and entrepreneurs to increase their participation in the industry across various roles, including ownership, management, and professional positions. SATI’s transformation strategy aligns with the Fruit SA Sector Plan, and they actively support Broad-Based Black Economic Empowerment (BBBEE) initiatives in grape farming areas with established bulk infrastructure and the necessary support services available. During the 2022/23 financial year, SATI supported 10 BBBEE initiatives and sponsored ten young black students to attend academic institutions, allocating 24.85% of their levy income towards transformation initiatives.

**Table 13:** South African Table Grapes Industry (SATI) expenditures on transformation, 2022/23


Pillar	Specific activities funded	Number of beneficiaries	Amount spent (Rands)
Enterprise development	Vineyard Development Programme	126	5 519 067
	Helpdesk and Advisory services/CPAC sittings assessments	22	514 949
	Hortfin		714 231
Skills development	Bursaries	10	696 635
	Modular Course (Stellenbosch University Short Course in Table and Raisin Grape Production) and other on-farm or Leadership Short Courses	27	149 245
	10 ITGS	10	89 600
Management control/	Management	2	1 774 404
Socio-economic development	Farm Worker Development	48	175 900
<b>Total</b>			<b>9 634 031</b>

Source: SATI, 2024

The financial allocations outlined in **Table 13** demonstrate SATI’s commitment to transformation initiatives, categorised into four key pillars: Enterprise development, skills development, management control/ownership, and socio-economic development.

- Enterprise development: SATI invested R5.5 million in the Vineyard Development Programme, supporting farmers in revitalising and expanding their vineyards to enhance yields, quality and crop protection. Additionally, R514 949 was allocated to helpdesk and advisory services, providing essential support to farmers in areas like compliance management and marketing. The Hortfin programme received R714 231, offering financial assistance to black-owned businesses in the industry. This initiative gave farmers access to loan funding of more than R80million to date.
- Skills development: SATI also invested R696 635 in bursaries for black students pursuing higher education in agriculture, aiming to develop a skilled workforce and promote industry inclusivity. Furthermore, R149 245 was spent on modular courses and leadership short courses, upskilling farmers and workers involved in BBBEE initiatives. Additionally, R89 600 was invested in subsidising participation in the 10th International Table Grape Symposium, hosted in South Africa, offering valuable learning opportunities, direct networking access to stakeholders from the





global table grape industry and first-hand access to research outcomes impacting on-farm decisions.

- **Management control/Ownership:** A substantial portion of the expenditure, totalling R1.7 million, was dedicated to promoting black representation in senior management positions within the industry, project management and overheads. This funding includes support for the Transformation Manager role, which is responsible for addressing stakeholder challenges through decision-making and recommendations.

- **Socio-economic development:** Under Socio-Economic development, SATI invested R175 900 in initiatives focussing on community upliftment and farmworker well-being. These initiatives included support for the Agri Got Talent/Farmer Worker Development programme, which empowers participants with valuable skills through training workshops and prizes.

#### **Pomegranate Association of South Africa (POMASA)**

POMASA aims to expand the pomegranate industry and supports producers of other crops who wish to diversify. Although the industry is too small to have a dedicated transformation team, transformation remains a priority, with a dedicated portfolio at the board level. The transformation strategy focuses on enterprise development, business support, market readiness and access (including meeting market requirements), technical assistance, network building for primary producers, and engaging with government departments. POMASA supports the Mitrock Pomegranate project, which rehabilitates 12 hectares of pomegranates. During the reporting period, POMASA invested R145 067 in transformation initiatives. POMASA's assistance aims to help these growers become commercially viable over time.

#### **South African Olive Industry Association**

SA Olive fully supports transformation, but available funds for enterprise development, skills development, and ownership are limited and require additional funding for significant impact. As SA Olive cannot fund land or infrastructure, it facilitates transformation through technical advice, business support (e.g., business planning, starter packs), knowledge transfer, mentorship, networking, and exposure opportunities.

The industry focuses on assisting new entrants who are not growers in establishing their olive product brand and marketing it locally and internationally. SA Olive collaborates with other organisations and institutions to amplify the impact and leverage available resources.

During the review period, SA Olive invested R172 986 in transformation initiatives. Of this amount, R59 154 went towards enterprise development, while R2 400 supported skills development for industry stakeholders. Management control received R94 932, aimed at implementing robust governance and operational frameworks within olive enterprises. Additionally, R16 500 was allocated to socio-economic development initiatives.

The industry comprises 194 commercial farmers, with no smallholder farmers. However, two BEE projects promote Black Economic Empowerment within the predominantly white commercial farming sector. To increase smallholder farmers' market share, SA Olive supports new entrants in the downstream value chain, enabling them to establish a brand (branding-marketing) and potentially integrate upstream by acquiring land and growing olives in the future. Newcomers to the olive farming industry may face challenges.


#### **Citrus Industry Trust (CIT)**

The Trust fund's beneficiaries within the citrus industry are the Citrus Academy (CA) and Citrus Growers' Association—Grower Development Company (CGA-GDC), which focus on skills development and enterprise development, respectively. The Trust is committed to transformation through the active participation of black-designated groups in the citrus value chain. During the review period, the Trust spent approximately R250 000 on enterprise development and awarded R350 000 in bursaries to 14 students.

#### **Deciduous Fruit Industry Development Trust (DFIDT)**

The Trust itself is not responsible for implementing transformation projects. The Trust requests proposals from the sector, evaluates them, and awards funding to the project that best meets its objectives. In the past, the Trust provided funding for human capital





development (bursaries). More recently, the Trust has funded a feasibility study to explore reviving deciduous fruit farms in the Free State Province for economic development. A total of R345 000 was allocated for the Free State Feasibility project in 2021, anticipating additional funding for a new project in 2024. The Trust is funding another project focussed on Capacity Building and Training.

#### **Potato Industry Development Trust (PIDT)**

The Trust itself is not responsible for implementing transformation. Potatoes South Africa (PSA) is the Trust's implementing agency, carrying out all Trust-related activities. At least 20% of statutory levies is invested in transformation, guided by NAMC's transformation guidelines. The Developing Producers Committee is responsible for nominating representatives to the Potatoes South Africa Transformation Committee and identifying needs, challenges, and opportunities for emerging Black commercial producers. In the 2022/23 financial year, the Trust spent R13.8 million on transformation initiatives.

#### **Enterprise Development Programme:**

Develops Black farmers to grow and produce potatoes commercially in a sustainable way. In the 2022/23 financial year, 15 enterprise development farmers were supported. PSA has collaborated with the Limpopo and Western Cape departments of Agriculture, Kagiso Trust, Afgri, VKB, and others. PSA provides support through seed purchase, mentorship, pre-feasibility studies, and business plans for New Era farmers. Seed is supplied on a four-year 25% sliding scale to ensure that farmers can stand on their own and run a sustainable venture at the end of the four-year support period. Approximately R9.3 million was spent on enterprise development, with an additional R30 million received from DALRRD.

#### **Small Grower Development Programme:**

A subsistence farming project aimed at communities, focussing on food security, rural development, and job creation, reached over 800 community members in the past financial year, with an average of 55 participants per project. Forty-five projects were supported in KZN, Eastern Cape, and Limpopo, and R400 000 was spent.

#### **Skills development:**

PSA continues to provide skills development programmes for enterprise development farmers, ensuring they can make sound business decisions. A skills audit identified gaps in skills; consequently, all enterprise development farmers receive financial management training. The programme aims to expose students to the potato industry, enabling them to make informed career choices based on their experience. Currently, the Trust funds 19 students, with 12 also receiving funding from AgriSETA. Additionally, R1.1 million was spent on skills development.

#### **Commercialisation and sustainability:**

The potato industry defines 'commercial' as at least 30 hectares. To date, four growers have successfully commercialised. Additionally, the industry has increased the average farm size to 15 hectares. Notably, some farmers are achieving a tonnage of over 60 tonnes per hectare, equivalent to 45 tonnes on 30 hectares, the industry average.

#### **Partnerships:**

PSA has partnered with several institutions to facilitate the placement of funded students. Partnerships are formed with potential employers, and arrangements are made to host PSA-funded interns. Additionally, strong partnerships exist with the various departments of agriculture in several provinces (KZN, LP, EC, GP, MP). These partners are crucial in mobilising the community to participate in smallholder projects. A monitoring programme is in place to ensure the success of these projects. Furthermore, the Trust has partnered with the following institutions to ensure the sustainability of enterprise development projects: VKB, McCain, PepsiCo, and various departments of agriculture and rural development.

#### **Hortgro:**

The Pome and Stone Fruit Industries prioritise transformation alongside economic and socio-economic development as core strategic focus areas. The industry envisions a globally competitive, equitable, unified, and economically transformed deciduous fruit industry through industry-led strategies and support programmes. With a holistic approach spanning primary production to the





entire value chain, the sector aims for inclusive growth and development across traditional and non-traditional production areas. Integrating first-generation agripreneurs into the mainstream economy is central to this vision, increasing participation and ownership among previously excluded individuals or groups. Guided by the Economic Development Advisory Committee, the transformation strategy drives economic progress and ensures governance alignment with broader industry goals and objectives.

**Table 14:** Hortgro’s expenditures on transformation, 2022/23

Pillar	Project Title	Amount Spent (Rands)
Enterprise development	PALS’ capacity to liaise strategically and promote various industry transformation initiatives based on the PALS framework.	1 000 000
	Hortfin	13 900 000
	Technical Support	430 251
Skills development	Mentorship & Internship	335 277
	Bursaries	1 900 000
Management control	Post Investment Support	-
Socio-economic development	AGT (Talent Competition for Agri-Workers)	300 000
<b>Total</b>		<b>17 865 528</b>

Source: Hortgro, 2024

During the period under review, Hortgro invested R17.8 million in transformation initiatives.

**Enterprise development:** Out of the total transformation allocation, R15.3 million went to enterprise development. Hortgro identified fruit industry projects aligning with the PALS framework for collaboration with the Pome and Stone fruit industry. Through Hortfin, Hortgro collaborated on projects, providing technical and management support to emerging growers, funding approved businesses, and facilitating job creation and new hectare planting. Additionally, consultants and specialists were appointed to support emerging growers with technical and management expertise and skill transfer.

- **Skills development:** Under Skills development, Hortgro allocated R335 277 towards mentorship and internship programmes and R1.9 million towards bursaries. These initiatives, conducted in partnership with Agri-SETA, provide mentorship and internship opportunities alongside student bursaries. By leveraging additional resources and opportunities, Hortgro enhances its skills development efforts. The initiatives resulted in 30 completed internship placements, 30 students completing the mentorship programme, and 35 students receiving bursaries to support education and training in the fruit industry.

- **Socio-economic development:** Under Socio-economic development, Hortgro allocated R300 000 to the AGT Talent Competition for Agri-Workers, providing mentoring, training, coaching, and assistance to 10 previous winners to empower agri-workers and promote agricultural talent.

- **Black farmers’ participation in pome and stone production:** In the pome and stone fruit industry, around 1 184 producers operate, with 1 105 being commercial farmers, predominantly white. Additionally, 79 BEE projects focus on empowerment within the industry. A market share analysis shows that commercial farmers hold a 93% share, while smallholder farmers hold 7%.





### 5.3.13. Pecan Nuts

The South African Pecan Producers Association (SAPPA) board fully supports the pecan nut industry’s transformation. A Transformation Committee, chaired by the Director of Transformation, oversees this process. The manager and technical staff dedicate 15-30% of their time to transformation. Since 2014, SAPPA has provided 22 640 trees to 93 beneficiaries. During the review period, the industry supplied 2 850 trees to 39 existing and 6 new beneficiaries. SAPPA invested R1.9 million in transformation initiatives (see Table 15), with R1.6 million allocated for Enterprise Development to aid farmers in purchasing orchards, soil preparation, fencing, irrigation, and inputs. Additionally, R217 225 supported two black students with bursaries and trained 51 new and existing pecan nut farmers. A further R76 800 was spent on socio-economic development, supporting schools and non-profit organisations with land for tree planting.

**Table 15:** SAPPA’s transformation expenditure for 2022/23

Pillar	Activities funded	Amount spent (Rands)
Enterprise development	Assist black farmers in establishing new pecan nut orchards.	1 614 325
Skills development	Bursaries to black students, skills development and mentorship for farmers.	217 225
Management control		70 000
Socio-economic development	Provide trees and assistance to schools and non-profit organisations with available land.	76 800
<b>Total</b>		<b>1 978 350</b>

Source: SAPPA, 2024

Commercialisation and sustainability: Transformation aims to create black commercial and sustainable enterprises. Six projects were already commercial before receiving industry support, while three have been commercialised and five show potential. After receiving support, 26 projects ceased operations, while 67 continue. Given the long period between planting and harvesting (seven to ten years), only five commercial farmers can sustainably earn an income from pecan nuts. In South Africa, 800 farmers produce pecans, including 200 black smallholders and 400 commercial farmers, mostly white. Producing pecan nuts is challenging due to the lengthy harvesting and profitability period, typically five to seven years. As a result, some projects are not yet fully profitable pecan nut enterprises.

#### Success stories

Despite the industry’s setbacks, there are some success stories to share. These anecdotes also indicate progress in industry transformation initiatives. Although collaboration has not yet achieved many success stories, the following examples demonstrate progress.

#### Raisins SA

Through strategic collaborations, Raisins SA facilitated interest-free loans totalling over R3 210 000 to 8 040 emerging producers in partnership with PepsiCo, offering farm development assistance to seven producers. Noteworthy achievements include three farmers receiving R200 000 each from Agri-Enterprise, alongside signing a three-year contract with Carpe Diem to advance women’s initiatives. Moreover, Raisins SA successfully implemented and monitored two projects valued at R20 million through the Kgodiso Development Fund, promoting sustainable vineyard development and empowering farmers. Furthermore, Raisins SA demonstrated its commitment to skills development by allocating R2 379 191 towards various skill-enhancement programmes. These initiatives





encompassed implementing a Guidance Officer Programme, structured training sessions benefiting 236 farm workers, and facilitating the placement of 76 graduates, with five securing permanent positions, thereby significantly contributing to industry growth and sustainability.

### **Macadamias South Africa (SAMAC)**

SAMAC partners with various entities for skills, enterprise, and socio-economic development. To date, SAMAC has successfully placed 26 students through the Recruit Agri Learnership, transitioning them into employment. The aim is to equip individuals with skills suitable for junior orchard management positions, including macadamias. Most programme graduates secure industry positions. From the 2023 cohort, 70% have been placed on farms, assuming crucial roles across production areas. Recruit Agri is diligently working to place the remaining 30% before the end of Q1.

## **6.3. SA Wine**

Innovation has fostered product quality enhancement through strategic partnerships, while joint promotional initiatives have elevated the industry's image. A notable collaboration with Food for Mzansi was "The Faces of Summer" campaign, which promoted local wines and showcased black-owned brands. The 2023 campaign, a joint venture between SA Wine and Food for Mzansi, celebrated the wine industry's diversity, featuring emerging and established brands. This collaboration aims to amplify black-owned brands and makers' stories, providing greater visibility and recognition within the industry.

### **Challenges facing the agricultural sector impacting on transformation**

Transformation remains a vital mandate for Trusts, levy administrators, and the public sector. The private sector—Trusts and industries—is crucial for promoting inclusive growth and participation. However, the private sector faces transformation implementation challenges, including difficulties raised by agricultural Trusts and industries/levy administrators, requiring the government's attention, particularly the Minister of DALRRD:

- Production inputs – During the review period, production input costs more than doubled, partly due to the Russia-Ukraine conflict. Most black farmers now rely on industry or government support for inputs.

- Load-shedding – Farmers and agripreneurs rely on electricity for irrigation and daily operations. Power supply disruptions have driven some out of business. Enterprise development must include electricity support—renewable or fossil fuels—for farmers to run competitive, sustainable enterprises.

- Ownership of land – The Pro-Active Land Acquisition Strategy (PLAS) requires revision. Government departments must coordinate support for new lessees alongside suitable land reform beneficiary selection ("right jockeys") and induction programmes emphasising commercial returns.

- Blended finance – Blended finance models need greater accessibility for businesses and individuals with limited track records and security, offering a broader funding option range.

- Production-cost facility – Growers require an accessible facility with very low interest rates.

- Market access – Addressing market access issues is crucial for accessing new markets and maintaining existing shares. Resolving market/demand issues will benefit production, investment, black producers and entrepreneurs.

- Investment – Significant bulk/enabling infrastructure investment is vital in other provinces to address electricity shortages, poor road conditions, water usage and licensing, and port facilities. These factors impact the ability to produce high-quality products and meet domestic and international demand.

### **Conclusion**

The report provides an overview of progress and challenges in 2022/23 transformation activities funded through statutory levies and Trust funds. Act (Act 47 of 1996), statutory levies and Trust funds are sustainable financing mechanisms supporting various generic agricultural sector activities, including transformation initiatives aligned with the National







Agricultural Marketing Council's (NAMC) guidelines. Initially focussed on training, mentorship, social projects, and training material development, transformation has shifted towards enterprise development, skills development, and management control in recent years.

Furthermore, the report addresses 2022/23 employment equity within agricultural Trusts and levy administrators, highlighting the need for adherence to the Employment Equity Amendment Act, No. 47 of 2013. Despite progress in employing individuals from previously disadvantaged groups, disparities persist, as the workforce composition data shows. Regarding transformation income and expenditure, Trusts and levies crucially fund agricultural transformation efforts. NAMC's transformation guidelines facilitated effective resource allocation for initiatives as expenditures steadily increased over the years. The 2022/23 financial year's significant spending increase suggests renewed transformation commitment, driven by increased funding allocations and increased awareness of the importance of inclusivity and equity in agriculture.

Lastly, the report underscores the importance of sustained investment and strategic interventions to advance transformation objectives within the agricultural sector. Continued stakeholder collaboration, adherence to the legislative framework, and proactive measures addressing disparities are essential for fostering a more inclusive and equitable agricultural sector in South Africa.







*Appendix*

**Appendix A**

Transformation managers' contact details

**Appendix B**

2021/22 Levy and Trust transformation questionnaire

## Appendix A

Administering Body	Contact Person	Transformation Manager
Cape Flora SA (Fynbos)	Ms Karien Bezuidenhout T: 021 870 2900 F: 021 870 2915 karien@hortgro.co.za	
Citrus Growers' Association of SA		Mr Lukhanyo Nkombisa C: 072 257 8386 lukhanyo@cga-gdc.co.za
Cotton SA		Mr Tertius schoeman T: 012 804 1462 C: 072 488 1415 tertius@cottonsa.org.za
National Lucerne Trust	Mr Fritz Ruppig T: 044 272 8991 C: 082 823 7201 fritz@lusern.org.za	
Milk SA		Mr Godfrey Rathogwa T: 012 460 7312 C: 082 900 6712 godfrey@milksa.co.za
HORTGRO	Mariette Kotze T: 021 870 2900 mariette@hortgro.co.za	
DFDC	Mr Ismail Motala T: 021 205 7133 ismailm@dfdcsa.co.za	
SA Macadamia Growers' Association		Mr Juandre du Toit T: 012 001 4107 C: 071 611 5184 juandre@samac.org.za
SA Olive Industry	Ms Wendy Petersen T: 021 201 8506 C: 082 578 4465 wendy@saolive.co.za	



SA Table Grape Industry		Mr Wilton September T: T: 021 872 1438 F: 021 872 4375 wilton@satgi.co.za
Raisins SA		Ms Simone Sell T: 054 495 0283 Simones@raisinssa.co.za
SA Cultivar & Technology Agency (SACTA)		Mr Sandile Mahlangu C: 076 597 8278 Sandile@sactalevy.co.za
South African Pecan Producers' Association		Mr Andre Coetzee C: 083 271 6577 andrecoetzee@hortgro.co.za
South African Pork Producers' Organisation		Ms Kgadi Senyatsi T: 012 100 3035 C: 073 861 3588 kgadi@sappo.org
Pomegranate Producers Association of South Africa (POMASA)	Ms Andriette de Jager T: 021 870 2900 F: 021 870 2915 andriette@hortgro.co.za	
Potatoes SA		Ms Rendani Murovhi T: 012 349 1906 C: 084 977 0579 Rendani@potatoes.co.za
Red Meat Industry Services	Mr Dewald Olivier C: 082 800 3737 dewald@rmis.co.za	
South African Wine Transformation Unit (SAWITU)		Ms Karin Kleinbooi T: 021 276 0720 C: 082 922 6144 karin@sawine.co.za
Mohair Empowerment Trust		Ms Beauty Mokgwamme T: 041 581 1681 beauty@mohair.co.za





## APPENDIX B

# AGRICULTURAL INDUSTRY TRUSTS AND LEVY ADMINISTRATORS TRANSFORMATION QUESTIONNAIRE – 2021/2022 SURVEY

### Purpose of the survey

This questionnaire is sent to Trusts, Levy administrators, CEOs, and transformation managers to assess the status of transformation activities funded through Trust funds and the 20% transformation levy, as per NAMC’s generic transformation guideline pillars. NAMC has established a Transformation Review Committee to monitor the progress of industries’ transformation. NAMC acknowledges the excellent work done by industries administering levies and Trust funds over the years, funding key areas such as enterprise and skills development. This information collection will occur annually to compile the “annual transformation report on interventions funded through Trust funds and 20% statutory levy funds”. Trusts, Levy Administrators/CEOs, and Transformation/Development Managers are kindly requested to provide NAMC with the following information:

### PART A: General information

Name of your organisation & industry:

Does the industry/Trust have a Transformation Manager/Officer? If yes, please fill in the table below:

**Table 1:** Transformation manager/officer information

Name of Transformation manager/officer	Gender		Age	Ethnic group	Contact details
	M	F			

Please fill in the employment equity table below:

**Table 2:** Employment equity details

Number of staff employed:	African			Coloured			Indian			White		
	M	F	Y	M	F	Y	M	F	Y	M	F	Y
Top management												
Senior management												
Professionally qualified												
Skilled												
Semi-skilled												
Unskilled												
<b>Total</b>												

### PART B: Transformation initiatives/projects

- 8/1. What is the industry/Trust view and approach to transformation?
- 8/2. Does the industry/Trust have a transformation strategy with targets?
  - 2.2.1. If yes, please attach
  - 2.2.2. If not, why not?
- 8/3. How many transformation initiatives/projects are supported by the Trust/industry levy administrator?
- 8/4. What is the annual value of all supplier development contributions made towards black-owned enterprises by the Trust/industry?





**Table 3:** Supplier development contributions

Males	Females	Youth
R	R	R

8/5. Have any partnerships been developed to implement Trust/industry transformation? If yes,  
 2.5.1. Which stakeholders and what type of support are provided through these partnership(s)?  
 .5.2. What challenges is the industry/Trust(s) facing due to these partnership(s)?  
 2.5.3. What are the successes of these partnerships?

2.5.4. How many transformation initiatives/projects have been commercialised through these partnerships?  
 Please name them and share some of the success stories

## 2.6. What approach is used by the Trust/industry to monitor progress?

8/6. The table below presents the NAMC’s pillars of transformation. Please complete it.



Table 4: Pillars of transformation guidelines

Pillar	Project title	Specific activities funded	Outcomes of programmes (Please provide details, e.g., areas/ regions, actions performed, hectares/ livestock numbers/ tonnages produced, jobs created, etc.)	Number of beneficiaries		Markets <sup>1</sup>		Location	Status of supported/ planned projects	Amount spent	% of the amount spent
				Males/Females/ Youth	Volumes	Type of market	Volumes				
Enterprise development											
Skills development											
Management control											
Ownership											
Socio-economic development											
<b>Total</b>											

<sup>1</sup> Are these long- or short-term markets?



## 2.8 Based on the information provided in Table 4

How many Transformation initiative beneficiaries have been commercialised by the Trust/industry to date?

2.8.1. How many projects stopped operating after receiving Trust/industry support?

2.8.1.1. How many beneficiaries remain viable after the Trust/industry support?

2.8.1.2. In terms of the projects supported, how many of them are sustainable?

2.8.2. The table below seeks to gather information regarding the producers in your industry. Please complete.

**Table 5:** Industry information to track transformation in the sector

Estimated number of producers	Number of smallholder farmers (predominantly black producers)	Number of commercial farmers (predominantly whites)	Number of BEE projects and their market share?	Percentage of market share of smallholder farmers (predominantly black producers)	Percentage of market share of commercial farmers (predominantly white producers)

- Based on the information provided in Table 5, what is the industry plan to address the gaps around the market shares?
- What are the challenges the Trust/industry faces regarding transformation?
- Any other matter you would like to share for the Minister's attention regarding transformation?

### ***PART C: Black farmers' value chain participation***

- Subsistence farmer: producing for household consumption, may market limited surplus production with an annual turnover of less than R50 000.
- Medium-scale commercial farmers: producing for markets with an annual turnover ranging between R5 Million and R20 Million
- Large-scale farmers: producing for the market to make a profit with an annual turnover above R20 Million







**Table 6:** Predominantly black farmer's participation

	Subsistence farmers	Medium-scale Commercial farmers	Large-scale commercial farmers
3.1 Quantity of product output (tonnage)			
3.2 Value of production per category of smallholder farmers (Rands)			
3.3 Share in the domestic market sales (%)			
3.4 Share in the domestic market sales (%) in the agro-processing			
3.5 Share in the export market sale (%) to SADC countries			
3.6 Share in the export market sale (%) to EU countries			
3.7 Number of producers in the industry			
3.8 Number of jobs created in a farming enterprise			
3.9 Gender of producers			
3.10 Productions areas and size by region			
3.11 Average price per unit			
3.12 Value of sales to informal markets / formal markets / international markets			
3.13 Total value (at the first point of sale) of local production levied (not the value of the whole industry)			

THANK YOU FOR YOUR CO-OPERATION

